Manager Guidance: Handing over a role

Preparing to give or receive responsibility

A role "handover" (as opposed to "patient handover" for a clinician) is the transfer of responsibility and accountability for some or all aspects of a job, on a temporary or permanent basis. It entails appropriately developing, guiding and transferring information to help deliver an efficient, effective and safe service.

A successful handover of responsibility will help support the success of leaders. You can use this guide to prepare a handover for a new leader. You can also use this checklist to ensure you are ready to assume a new leader role.

Contents

Role and Unit/Team

Provide and discuss:

☐ The Role Description for this position

☐ Position Occupancy report along with an explanation including who is on temporary contracts and if any contracts are due to end

☐ Team organisational structure including any staff movements (i.e. staff acting currently / elsewhere and any new staff who are due to commence)

☐ Team members Role Descriptions, task lists and roles

☐ Where performance plans for staff are located and when they are due for review

☐ Any staffing concerns including any staffing, behavioural or interpersonal concerns or sensitivities that are currently occurring

☐ Any local personnel files or notes (i.e. electronic or hard copy)

☐ Any upcoming planned leave and how to manage new leave requests

☐ How to read and build rosters, hours and patterns of work, Best Practice Guide, any relevant entitlements / allowances to be aware of

Necessary Relationships

Provide and discuss:

☐ Key contact list – internal and external contacts i.e. departments, key staff, key community contacts, external providers along with and explain when and why to contact them along with the relationship they have with Metro North HHS

☐ Executive and Senior Manager "on-call" numbers, roster and when they would need to be contacted

☐ Which meetings and committees to attend, what meeting and committee does and in what capacity the person attends. Ensure these are scheduled in the calendar

System Knowledge

Provide and discuss:

☐ Line manager task list / overview

☐ Metro North HHS Strategic Plan and any relevant Operational / Clinical Plans / Service Profiles / KPI's / Goals / Closing the Gap

☐ HR and Finance Delegations

☐ If this position is a Cost Centre Manager (CCM)

- Cost Centre Manager Report and financial position explained along with processes and responsibilities of a Cost Centre Manager or line manager
- Cost Centre Code(s)

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- ☐ Travel – patient travel including the PTSS (Patient Travel Subsidy Scheme) and responsibility as Approving Officer (if applicable)
- ☐ Travel – staff travel – process along with any up and coming staff travel
- ☐ Forms which are regularly used. Explain why the form is used and where it is are located (e.g. DSVFs, Movement Forms, AVACs, travel forms etc).
- ☐ Workplace safety details including the Chief Warden, details including the Chief Warden, Area Warden, Warden, Fire and Evacuation Plan and Fire Indicator Panel details.
- ☐ Incident and complaints management process explained (Riskman system) and any outstanding items highlighted
- ☐ Additional business unit reporting requirements –the types of reports, how and when they need to be run/completed
- ☐ Building Security – organise appropriate keys/swipe card access and explain any particular information they need to be aware of
- ☐ Is there a current Disaster Management Plan in place? If so, explain where it is located and what the role of the line manager and the team is in this plan

Essential IT Access

Provide access and discuss:

- ☐ Decision Support System (DSS)
- ☐ Emergency Department Information System (EDIS)
- ☐ Enterprise Discharge Summary (EDS) and The Viewer
- ☐ Hospital Based Corporate Information System (HBCIS)
- ☐ Network Drive Access including appropriate files / folders (especially if there are any personnel and / or confidential files / folders)
- ☐ Riskman and ensure the Delegate assigned in Riskman is correctly assigned.
- ☐ S/4HANA
- ☐ Workbrain / MyHR

Essential Professional Requirements

Does the role have essential professional, clinical or organisation requirements such as:

- ☐ Clinical credentialing
- ☐ Mandatory training
- ☐ Evidence of qualifications

Essential Contacts

Human Resource Business Partner

Phone: 3647 2819

Email: MetroNorthHR@health.qld.gov.au

QHEPS Human Resource Page

Finance Business Manager

Finance contacts

Micro-Skills to consider

What to know:

- ☐ Accrued Day Off (ADO), Rostered Day Off (RDO) and Flextime
- ☐ Health and Safety Incident Management
- ☐ Manager Health and Safety Obligations
- ☐ myHR
- ☐ RiskMan and Incident Reporting
- ☐ Rosters
- ☐ The Payroll Cut-off
- ☐ The Rights and Responsibilities of a Manager
- ☐ Timesheets

How to act:

- ☐ Be Approachable
- ☐ Delegate
- ☐ Listen
- ☐ Maintain Your Composure
- ☐ Make Good Decisions
- ☐ Solve Problems
- ☐ Handle Mistakes
- ☐ Show You Care About Staff